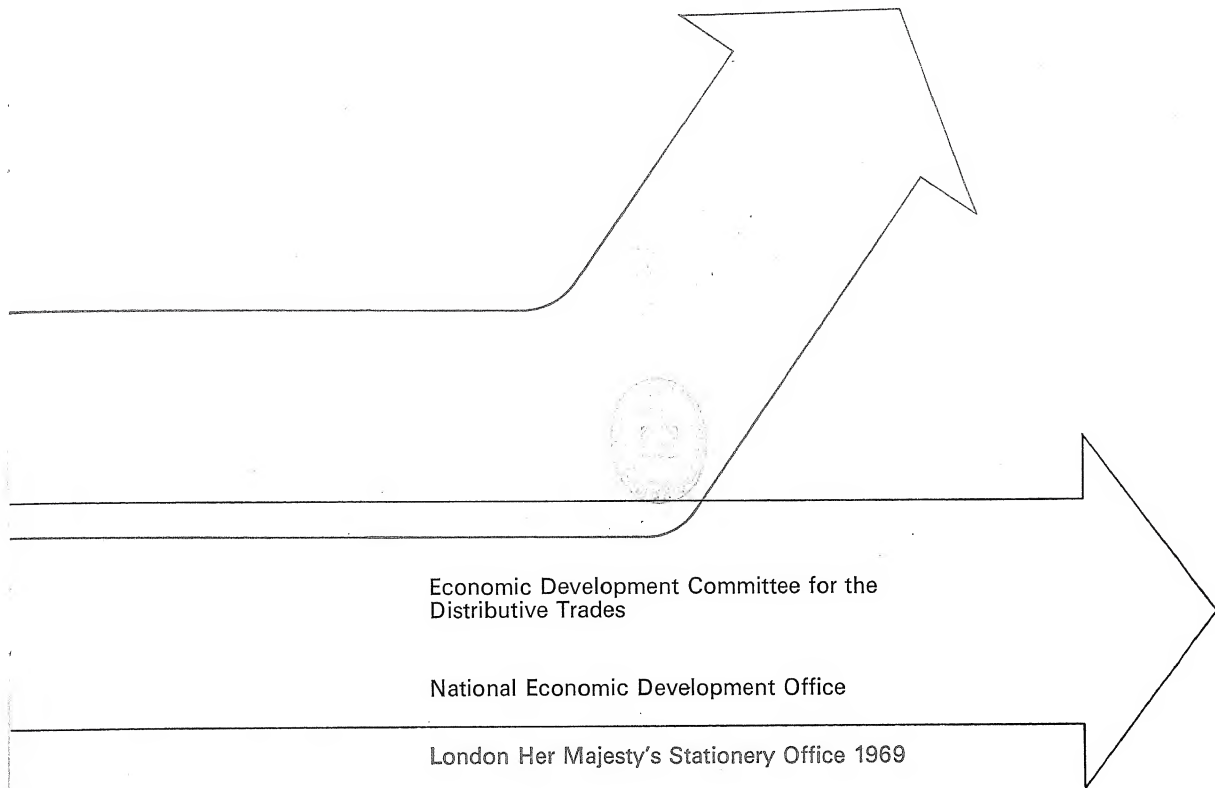


management training in the distributive trades



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Introduction

This booklet is a practical introduction to the theory and practice of management training and education in the distributive trades.

It examines, briefly, the practical justification for planned training; describes what and who should be trained; and indicates the steps needed to design a system of training which, it is hoped, the Industrial Training Board for the Distributive Trades will find acceptable and therefore recognise as grant-worthy.

It also refers, with examples, to some well established techniques which will improve the overall performance of management. Their use will strengthen weak managers and give to good ones analytical tools that will provide an insight into the causes of failures and a deeper understanding of managerial responsibility.

All training programmes can be improved and as the booklet deals in some detail with a number of aspects of management development, there are features within the booklet that will be pertinent and of use to all businesses. The distributive organisation without a planned management development programme may well find that the document provides a sound basis for building its training programme.

part one



WHY

The case for management training in distribution

The distributive trades include the largest single group of the working population in the United Kingdom, employing about three million people in more than half a million separate establishments. The industry has many areas in which management is more efficient than in the past, nonetheless there is still a desperate need for more and better management training of all kinds.

Since the war distributors have met increasing competition with economic vigour and a genius for adjustment to change. Businesses in which methods and attitudes had not altered for many years have changed their techniques of operation and modernised their organisations. Rationalisation of delivery and other services and centralisation of administration have taken place in many companies. Premises have been modernised, management controls improved and traditional attitudes rethought. In the food distribution trades in particular, fundamental changes have been accomplished in a few short years. Some firms have introduced management development schemes to raise the standards of managerial performance in dealing with the new situation.

These developments have been brought about by changes in the national economy. The costs of labour and premises are rising steeply and ability at all levels is at a premium, particularly in the managerial fields. Basic trading knowhow is no longer enough to secure a livelihood for distributors and except in those organisations having very skilled management, net profits have risen at a much slower rate than costs. Too many managers, for example, are unable to control stock losses, staff wastage and operating costs. They do not know how to make the most efficient use of space, to determine optimum stock level and mix, or to anticipate demand and regulate supply. Management generally has rarely been trained in modern trading techniques or taught how to deal effectively with human beings.

Because the distributive industry does not yet present the image of a modern employer, it is not able to attract and hold the best workers. With relatively full employment, distribution is in danger of becoming not a first, but a second or third choice for school leavers and graduates. Staff may therefore be limited in quantity and quality, labour turnover high and managerial

energies be wasted in replacing staff losses. The human and organisational challenges, and the opportunities for early management, which are the industry's greatest assets as an employer, are largely unappreciated by many who would find most satisfaction in grasping such opportunities.

The focal point of these problems is the inability to match the managers to the task required of them. In an essentially personal business in which few processes are suitable for mechanisation, this constitutes a threat both to immediate growth and to the return on investment from which future growth stems. The solution is to recruit the right type of managers to fill vacancies and to train them effectively, at the same time retraining existing managers to apply their experiences more effectively to increasingly competitive and difficult conditions.

The problems are acute, but not insoluble. Developments in managerial skills have made available knowledge which, if used in the distributive trades, could vastly improve their efficiency.

There is a need to reappraise traditional methods and well worn practices from the boardroom down. The demand for effective controls, for good communications, for competitive and informed policies, requires that a company's top management should have a grasp of modern techniques and a good understanding of the social and economic environment. Modern aids to decision-making require managers to have some knowledge of statistical methods and of the social sciences.

The geographic dispersion of company facilities creates additional management problems. Communication can be difficult where face to face contact is possible, but it can be even more difficult when managers supervise men in widely separated locations. Rapid transportation and communication have made it possible to cope with this situation, but they have not eliminated the management problem. Formal communication channels and reporting systems must be substituted for much of the personal contact that is most effective in managerial relationships, consequently managers should make skilled use of these formal means of communication.

Although many companies are showing more interest in training managers, there is not yet nearly enough organised training available for managers in distribution, nor indeed, enough demand for such training to be provided. A number of those companies

that recognise the vital need for management training have begun to formalise existing training arrangements and to organise planned management training.

By involving all levels of management in its training objectives a company creates a climate where talent is encouraged and where able people can identify their personal goals with those of the company. The systems necessary for the administration of training schemes should ensure that individual progress is assessed regularly and objectively. While the direct aim of management training schemes is to raise the company's profitability, the human result of well conceived schemes is that they increase job interest and job satisfaction and help individuals to develop their capabilities.

These are great benefits, and to achieve them requires the acceptance of responsibility by all management ranks for the development of their subordinate managers; not only by releasing them for training sessions, but by taking time to talk to them about their work; by counselling and guiding them; and by encouraging progress, even though this may lead to promotion for the subordinate to another department.

Management development also calls for the acceptance by successful managers, whose training and experience may have been wholly practical, of the benefits of theoretical learning as part of the process of development. Many men in responsible jobs today lack formal training and have attained their positions by their personal abilities. Some resist the suggestion that academic study can improve on this 'method', arguing that management is a practical art and cannot be learned from books.

It should be made clear that all management training starts with the premise that management *is* a practical art, but that study of relevant subjects can make the learning process more effective. This is particularly true of the scientific aspects of such things as merchandising and pricing. The academic approach can make a trainee manager reflect about his experience and help him understand its implications more clearly and more quickly. It hastens the learning of routine matters, and helps fill the gaps often caused by the inability of skilled tradesmen to communicate their skills.

Theoretical and practical education complement each other in training for management; and planned programmes will balance and augment each other.

Senior managers may not be good instructors in the educational sense. But by their guidance, by example, by explanation and discussion, by sharing their experience, above all by their personal influence and interest, they make an essential contribution to the development of subordinate managers. Without this handing-on of practical experience, training schemes will merely produce men and women trained in a series of separate techniques and procedures—unrounded performers who are automata rather than leaders.

Summary

To summarise, a systematic training scheme for management will:

- 1** Enable the business to be run more efficiently and an optimum profit obtained from the investment in premises, equipment, staff and goods
- 2** Enable individual managers to develop their abilities to their fullest capacity within the firm, so that they may be helped to achieve their individual goals and to make a maximum contribution towards the company's goals
- 3** Ensure a supply of knowledgeable and competent managers to fill future vacancies.

part two



WHAT & WHO

What management does

The processes of management are continuous in that a decision to do something is followed by its fulfilment. The success or failure of the action is checked by measurement against some control imposed on the operation, and the results are reviewed. A second decision is then taken on what further action is to follow. This cycle can be described under four headings which would be the same whether the task undertaken is large or small: only the techniques of doing it will vary. The headings are:

Setting the objectives
Implementing or operation
Control
Review

Setting the objectives involves collecting ideas and information, analysing the information, making forecasts based on this analysis and planning future achievements and action.

The objectives are implemented by organising and co-ordinating the firm's resources.

Management is also continuously concerned with control and review, so that the business is maintained in the face of economic change, human failure and other factors not present when decisions were taken and objectives set. Actual costs are measured against budget; results are compared with objectives and events with forecasts. Action is then taken to correct or to develop and expand.

These four activities are applied to the day-to-day tasks of the business which require the use of the following resources of the business: finance, merchandise, people and premises. Under these headings, the operations of companies are divided, their organisations are determined, capital raised and allocated, trading policies initiated and leadership provided.

The function of managers is to make optimum use of the resources allocated to their care and in performing this function they apply the cycle of activities analysed in the foregoing paragraphs.

The amount of accountability and responsibility that is delegated to any manager depends upon the way the business is organised and the position that the manager has within the company's organisational structure.

What training should be given

On pages 11 to 16 an analysis has been made of the day by day tasks that may be carried out by the management in any type of distributive firm. This total picture of management tasks has been set out in the form of a grid showing the tasks, listed under the main headings of finance, merchandise, people and premises and the training which it is necessary for the manager to have if he is to carry out any particular task satisfactorily.

The tasks themselves will be recognised as 'the executive aspects of running a business'. Each of them takes place formally or informally in all businesses. Managers sometimes carry out the whole task—for example the managing director may be wholly responsible for raising and allocating capital; or part of the task is delegated—the managing director allocates £X capital to the acquisition, alteration and fitting out of a new shop, and the area supervisor allocates this money between fixtures, windows, lighting, heating, etc.

Columns A and B adjoining the list of tasks on the grid show the techniques and subjects which require to be studied and known before the tasks can be carried out to their best effect. The training requirements listed under A are job-oriented practical matters, requiring training directly related to the job as opposed to those under B which are *rounding* management topics and are intended to be background training requirements. The A training requirements are essential, the B training requirements are valuable but not essential in the short term.

Promotion training at lower levels of management will be concerned chiefly with current management techniques and systems. Senior managers and executives on promotion to wider spheres will find column B of the grid helpful in choosing the background subjects and more advanced techniques to study.

The Grid

Managerial tasks

Training requirements

A

B

1 Finance

a. Capital

Forecast requirements
Appraise projects
Decide policy for raising capital
Raise and allocate capital
Review and conserve resources
(assets, liquidity, etc)

Forward planning
Project appraisal
Financial planning and control
Methods of raising capital in the
distributive trades

The capital market
Government legislation related to finance

b. Profit management

Plan profits and maintain the plan
Analyse profits

Overall profit planning
Budgetary control
Use of profit ratios

Statistical methods of forecasting and control

c. Accounting

Plan, install and operate systems
Audit accounts
Interpret accounts
Control credit and cash (sales and purchase)

Knowledge of the accounts required in the
distributive trades and understanding of the
accounting process
Interpretation of profit and loss accounts and
balance sheets
Use of management accounting ratios

Developments in accounting methods
Proposed alterations in legal requirements
relating to company accounts

d. Control expenses

Forecast, allocate, analyse and control fixed
and variable expenses

Costing: standard costing, marginal costing
Allocation of costs and expenses

Cost benefit analysis

e. Insurance

Decide policy and implement

Principles of insurance

f. Security

Organise and supervise security arrangements

Security measures and methods in relation to
pilferage, burglary etc in shops and warehouses

g. Legal

Enforce legal requirements

Legal requirements relating to finance

Note: The blocks of training requirements in the A and B columns relate to the blocks of managerial tasks under the sub-headings. Within these blocks the training requirements do not necessarily correspond with the managerial tasks on the same line.

2 Merchandise

a Buying

Study market trends
Plan policy on: range; quality; pricing
Forecast requirements
Plan: stock assortment; sales targets;
stock targets
Choose merchandise
Negotiate with suppliers
Control: quantity; quality
Undertake comparison shopping
Liaise with manufacturers

Sales forecasting
Stock/range planning
Stock management and
stock control techniques
Departmental stock control
Quality control
Statistical analysis
Merchandise assessment
Budgeting
Financial control
Credit negotiation
Administration of buying
Commodity knowledge

Statistics

b Storage and distribution

Decide policy on storage and distribution
Plan warehouse and stockroom layout and routines
Operate routines
Control stock
Stocktake
Control transport use and costs
Allocate transport costs
Plan and operate dispatch procedures

Storage methods and practices
Warehouse administration
Warehouse economics
Stock control
Work study applied to the distributive trades
Materials handling
Transport economics
Transport accounting

Operations research
Analysis of trends and plans, local and
national, of communications planning

c Selling

Plan policies/plan methods of selling
Plan policy on: credit; delivery;
mail order; exports
Allocate merchandise to selling points
Price merchandise
Supply to selling area
Control: preparation of merchandise;
promotion and advertising;
presentation and display
Control quality
Control processing of orders
Sell in line with company policy
Control packing and dispatch
Control shrinkage and stock losses
Analyse competition

Selling methods
Merchandise handling and preparation
Marketing
Merchandise layout and display
Sales promotion and advertising
Sales management (internal and external)
Financial control
Statistical analysis and interpretation
Credit negotiation
Retail and wholesale pricing

Economics and methods of advertising
Principles of organisation
Customer motivation
Principles of distribution
Statistics

(continued on next page)

d Customers

Plan and operate: customer surveys;
customer services
Establish and implement customer complaint
services
Build and maintain goodwill
Establish public image
Establish and implement public relations service

Market research
Customer relations services
Communications: spoken and written

Public relations
Human relations
Consumer education
Consumer psychology

e Security

Organise and supervise security of goods

Security

f Legal

Enforce legal requirements

Legal requirements related to selling

3 People

a Personnel policy

Plan, review and operate:
organisation and structure;
responsibilities and work loads
Estimate staff requirements, present and future
Devise, implement and supervise work programme
Undertake job analysis
Prepare and review: job descriptions;
personnel specifications
Establish and maintain communications

Law governing employment in the
distributive trades
Manpower planning
Work scheduling
Practices of communications
Interviewing
Job evaluation techniques
Recruitment methods
Methods of appraisal

Motivation – financial and non-financial
incentives
Theory and practice of communications
Social psychology of industry
Psychology of learning
Training and education resources and
availability
Wage theory
Ergonomics and work study
Theory of organisation
Current employment legislation
Social service facilities

b Recruitment

Plan policy
Advertise
Select and place recruits
Establish standards of performance
Measure and maintain performance
Institute and operate staff appraisal procedures

As above

c Training, development and promotion

Prepare and review training specifications
Establish training, promotion and succession policy
Implement induction, basic job and continuation
training programmes
Implement management development and
management training programmes
Liaise with external training and educational
establishments

Assessment of training needs for distribution
Preparing recommendations
Programme and syllabus design and
administration
Planning individual development
Management development
Training records
Training of training staff
Instructing techniques and aids
Assessing training effectiveness

d Staff administration and welfare

Decide and implement: terms of service;
salary and wage policy
Consult and negotiate with trade unions
Determine and maintain working conditions
Decide, establish and maintain staff amenities
Maintain staff records
Maintain discipline
Get and maintain morale at required level
Counsel staff

Salary administration
Job evaluation
Staff records
Counselling and appraisal interviewing

(continued on next page)

e Health, hygiene and safety

Decide and implement policy on employee health, hygiene and safety

f Security

Decide and implement security measures

g Legal

Enforce legal requirements

4 Premises

a Selection

Consider new locations or areas for expansion
Decide value of sites available
Acquire sites
Decide and control building/remodelling

Shop and warehouse site evaluation
Market research

Buying and selling sites and premises
Building contract procedures
Local and national planning

b Design and layout

Decide policy
Decide selling methods
Plan layout and review space allocation and services

Work study
Selling techniques

c Equipment

Decide policy
Decide acquisition method
Choose equipment and review suitability

Cost benefit analysis

d Maintenance

Establish and direct planned cleaning and maintenance routines for building and fixtures, plant and equipment

Planned maintenance
Maintenance practice

e Security

Establish and enforce: security regulations;
fire precautions; safety regulations

Security }
Fire } practices
Safety }

Knowledge of statutory requirements

f Legal

Enforce legal requirements

Legal requirements relating to premises

The Grid

Managerial tasks

Training requirements

A

B

5 Review and control

a General

Continuously study all relevant social, economic and political forces and trends
Apply results of studies to improve direction, objectives, profitability and operation of the organisation in the area of responsibility

b Corporate planning

Determine company major plans, policies — short and long term
Set company objectives
Translate company policies into department and/or area objectives, plans and policies
Implement company plans according to area of responsibility and authority
Co-ordinate company/department/area plans to achieve overall objectives
Measure performance overall and in detail
Adjust objectives in light of performance
Act decisively to bring performance up to par
Make decisions/take risks according to responsibility and authority
Decide relationship of premises to overall company policy
Review continually adequacy of present premises
Decide need for and direction of expansion/contraction
Decide between methods of acquisition
Decide financial plan

c Productivity

Study and attempt to improve work methods and layouts of working areas
Measure work to improve productivity
Devise and use retail yardsticks
Attempt to improve output of men, machines, money and material

d Production

Determine policy on own products/labels
Produce own products
Liaise with manufacturers to prepare 'own' labels
Prepare, prepack, make-up, repair, etc. products

e Legal requirements

Engage and work with legal experts
Oppose/support proposed legislation

Study of trade journals, government publications, books, statistics, etc

Forecasting trends
Strategic long term planning
Objective and target setting
Decision making and taking
Resource planning
Allocation and co-ordination of resources
Master budgeting
Report writing
Meeting procedures
Effective speaking
Planning and operating a co-ordinated information/control system
Management effectiveness
Methods of selling

Work study in distribution
Use of management ratios and interfirm comparisons

Fundamentals of production, planning and control

Legal practice not covered in separate classifications

Economics of distribution
Sociology of distribution
Legislation and planning trends (local and national)
Consultancy and advisory services

Organisation studies
Management by objectives
Total marketing concept
Co-ordination of future total activities
Research and development
Management personality development
Training in analysis and diagnosis to identify problems
Creative thinking and ingenuity
Quick reading

Product strategy

Who should be trained

Existing managers

Management training is often applied to existing managers in situations of change, eg:

- On promotion or in preparation for promotion
- On the expansion or diversification of the business, or other changes affecting the duties and responsibilities of managers
- On the introduction of new or different training techniques or policies
- On the introduction of new merchandise
- On the introduction of different management or employment policies
- On the appointment of specialists which requires adjustments in working relationships and communications, eg work study men or personnel officers
- On the availability of new developments in managers' own and related fields of work.

It is applied to existing managers in order to raise standards of managerial competence and perception, eg:

- By broadening their general understanding of the company's aims, of their own work, and of the part played by the latter in the former
- By raising their technical/trading skills
- By broadening their understanding of the social and economic environment of their trade.

Older managers – a special need

The distributive trades are full of long service managers whose experience and trading knowledge, loyalty and conscientiousness make an irreplaceable contribution to the industry. But these older men and women often suffer feelings of insecurity and anxiety, also perhaps some human resentment at being required to speed the progress of younger men to positions which they themselves may never have had the opportunity of reaching. Some of their skills may be obsolescent, and some of their attitudes outdated; in particular they are often confused or rendered cynical by the loss of pre-war disciplines, and they find difficulty in communicating with a younger generation who are ambitious and impatient of slow but sure methods.

The probability of gaining loyal and willing co-operation from such long service managers in the teaching of management trainees is greatly increased by consulting them when drawing up training programmes, and by making clear to them the importance of their contribution to training and of their knowledge and experience to the well-being of their shops.

Many such older managers benefit greatly from short, specially designed 'up-dating' courses; these introduce them to new methods or new reasoning about familiar factors, and help them to feel that it is possible to work well and happily in a new world. Some excellent results have been obtained in this way, and any company's training programmes should include, on grounds both of productivity as well as humanity, training for its older employees.

Management trainees – new recruits and promotables

Many companies rely very largely on outside sources to fill management vacancies when these occur. This is sometimes unavoidable but experience shows it to be expensive and often unsatisfactory if used as a regular practice. Management training schemes should include planned career-training for management trainees to ensure a supply of trained men to fill future vacancies.

There are certain risks and difficulties inherent in all management trainee schemes; these can be much reduced if certain preparatory work is undertaken before training schemes are initiated:

The company must have a climate which encourages learning and the progress of individuals.

There must be enough shop floor managers and other members of line management able and willing to carry out the practical job-training required.

Individual career-training programmes must be carefully planned, clearly communicated to all who will be involved, and adhered to.

The number of trainees at any time must be related to known or anticipated managerial vacancies, so that expectations held out to trainees on appointment may be realistic.

Some companies plan an annual intake from the sixth forms and universities of young people who are attracted by the challenges of direct selling and by the opportunities of promotion to managerial responsibilities at an earlier age than is possible in many other occupations.

Most companies have 'home grown' talent—promising youngsters who started work early, who have made exceptionally good progress and who are earmarked for promotion. Management trainees from whatever sources form a pool of ability and promise from which a company should develop its future managers by means of training programmes devised to exploit individual ability, growth-rate and natural talent.

Some wastage of management trainees will always occur, even in companies with long and successful experience of career-training. Wastage can occur even at the first selection of trainees. The interview is a fallible method of selection; it is perhaps at its least effective when used in the attempt to foresee how young people at the threshold of their working lives will fit into any particular occupation or surroundings.

part three



HOW

Basis of a sound training scheme

Sound administrative foundations are needed if management training schemes are to repay their cost in time and effort. Responsibility for management training is that of line management at all levels. Unless top management is convinced and gives the inspiration, worthwhile management training will not happen. Even where the conduct of management training has to be handed over to the firm's training department or to an outside organisation, management's responsibility and participation is vital. Managements must be responsible for selection and progressing of trainees, preparation of trainees to attend courses, de-briefing of trainees and ensuring maintenance of enthusiasm. In all this they should work in close and constant collaboration with their training or personnel officer where such an official is employed; above all, they have a vital rôle to play in giving trainees practical experience, coaching and responsibility so that trainees can apply what they have learnt.

Management training must be progressive and as far as possible must precede promotion. It should be related to each recognisable step in promotion. It follows that at the lower levels management training is best related to tangible examples of current management practices appropriate to the work the trainee is going to do when promoted. At the higher levels of company management the manager will have to react to his economic, business and even political environment and will find it necessary to study the 'B' subjects on the grid, especially those dealing with the wider aspects of business life.

Administration and preparatory steps

Preparation and administration of effective management training schemes falls under seven main headings:

- 1 Assignment of responsibility for company training including the training of managers
- 2 Analysis of the managerial function (and the use of the grid)
- 3 Appraisal of the work of the existing managers to determine their training needs
- 4 Assessment of future management needs in the company
- 5 Design and administration of training
- 6 Preparation and maintenance of records
- 7 Recruitment or selection of trainees.

Assignment of responsibility

Larger companies employing 800 staff or more will find that they easily justify the cost of a fully qualified full time training officer. The training officer would advise on, initiate, co-ordinate and, when required, carry out the whole range of training duties, including management training and the necessary administration. The duties of a typical senior training officer are outlined in Appendix 1.

Many companies employing perhaps between 400 and 800 people will find that they can also justify the appointment of a full time qualified training officer while other, smaller, companies may decide to second an executive to training duties, perhaps on a part time basis. These levels are given as approximate guides only as the demands of the training function vary from company to company.

In smaller companies or family businesses which intend to develop management training but which do not feel justified in appointing a full time training officer, the managing director may himself accept direct responsibility for the organisation of the scheme, or he may appoint a senior colleague to act on his behalf.

It is essential to the success of any management training scheme that it should be seen to have the full support of top management. The assignment of responsibility must be made with that requirement in mind. The delegation of these responsibilities, whether full time or part time, should not in any way reduce the responsibility of other members of the management team for encouraging the development of their own subordinates.

Analysis of the managerial functions and the use of the grid in determining training needs

Stage 1 - Job descriptions

Prepare a list of the management tasks which are being or should be carried out in the company. These are known as job descriptions. They are basic tools for organisation planning, clarifying a company's structure by the allocation of duties to particular posts and defining the boundaries within which the holder of a post will operate. They are detailed documents and should be kept up to date as the duties allocated, or the results expected, alter from time to time.

The job description of a position should include a statement of its purpose, scope, duties and responsibilities, and should describe the relationship with positions immediately senior and junior to the job. It is not possible to write general universal job descriptions covering the various management titles found in the distributive trades. Each company must write its own. The grid on p. 11 et seq can be used to assist in this task by identifying from the first column the relevant tasks that would be undertaken by the managers concerned.

Often there are marked divergencies between the existing job as it is being done by the job holder, and the job as the senior manager or supervisor imagines it to be done. Because of this a study and statement of all the facts concerning a job, which reveal its content and the modifying factors which surround it, should be made before writing up the job description. This job analysis should be done by making a close and sustained observation of the work being done, supplemented by discussion with the holder of the job.

Job descriptions serve a number of purposes, of which the following are relevant to the selection and training of managers:

- 1 They provide a statement of the tasks involved in any job.
- 2 They provide criteria for the measurement and assessment of the work-performance of the manager holding the job.
- 3 They provide a rational basis for interviews:
 - when selecting a person to fill the job;
 - when considering a person's claim to promotion to the job;
 - when discussing with a manager how the person is carrying out the job, and when counselling the person;
 - when promoting, demoting or dismissing as a result of appraisal based on the requirements contained in the job description.
- 4 They provide criteria for the measurement and assessment of the work performance of the manager holding the job.
- 4 They make it easier to spot weaknesses in a manager's overall work-performance and so to identify the training or coaching needed to correct them.

Some examples of job descriptions are given in Appendix 2.

Having drawn up the job description, the techniques and subjects relevant to the training for it can be seen from columns A and B of the grid.

It should be noted that any one task is carried out at more than one level by managers of different grades of seniority. As a task is delegated in whole or in part it becomes 'diluted' and changed in

emphasis and degree. Training requirements relevant to the task must be geared to the various levels of managers carrying it out.

Stage 2—Training control chart

Having drawn up the job description for the various members of management, a training control chart can be made which will show the training required to match the management requisite of the company.

From the job description, list all the management tasks that have been found.

Draw vertical columns beside this for each level, group or grade of manager in the company (*see p. 23*).

Prepare a list of training requirements to match the tasks by transposing the appropriate training requirements from columns A and B of the grid on p. 11 to the control chart (columns 5 and 6).

Starting with the most senior management post (column 2 in the examples), work down the complete list of management tasks (column 1) marking those tasks which are performed by that level of management in the appropriate column (column 2 in this example). Turn to the next level of management (column 3 in the examples) and again mark in this column the tasks performed by this management grade. Repeat the routine until all levels in the company are completed.

At this point a company may wish to proceed immediately to identify training requirements necessary to meet the tasks required of its managers at all levels. On the other hand it may wish first to refine the information on the tasks it has identified by making an assessment of the degree and depth to which each level of manager needs to perform each identified activity. A codemark to reflect this qualitative assessment could then be placed in the appropriate management column on the control chart. In the example, symbol ★ reflects the first degree, symbol ■ the second degree and symbol ▲ the third degree. Each company can develop codemarking to suit its own requirements but for the sake of illustration the example shows only three codes:

The symbol ★ is the code for the first degree. When this code is used it signifies that the tasks are performed by the manager named at the top of the column in a high level fashion, most probably of a policy making nature requiring considerable top management expertise and perhaps knowledge of sophisticated techniques.

The symbol ■ signifies a somewhat lower but still quite important degree; perhaps where the policy decision is translated into main operating procedures and where substantial authority to take initiative, to modify and to control is exercised.

The symbol ▲ shows a more routine degree of performance. Although some initiative will be exercised, the main emphasis will be on implementing procedures and seeing that standards are maintained in limited areas, probably by face to face management methods.

Often the same manager is responsible for more than one qualitative degree within the same task. In the owner/manager case, for example, each task would be performed at ★, ■ and ▲ degrees by the same man.

The coding can be extended at will. For example, a company may wish to use an extra code to mark those tasks which are of supreme importance to the well-being of its operation. In this way it could highlight the important training areas and ensure that in its training programme these topics are given appropriate time and attention. This would help to ensure that the training content is balanced to the company's needs.

The next step in using the control chart is to read off the training requirements opposite the marked task. This list will identify the training topics needed in a training and development programme to equip each level of manager to perform his role effectively and profitably.

The code mark against the task will indicate the depth and degree to which the manager should be trained to cover the qualitative demand of his job in that particular activity.

From the control chart the company has the following information almost at a glance:

- 1 A list of the individual management tasks required to perform effectively the total functions of the company. This list should be checked regularly to ensure that it is complete and up to date.
- 2 A job description for each manager or management grade in the company. These descriptions will be checked to ensure that: all the management tasks are being continuously covered at some management level; the tasks are being covered by the correct grade of manager; no manager is under- or over-loaded with activities.

- 3 A qualitative codemark against each task showing the degree of expertise and sophistication required to perform that task at that level of management. The codemarking will indicate: whether each management level is carrying out the correct degree in each of its individual tasks; whether the job descriptions reveal qualitative under- or over-loading of any management grade.

There are two points to note:

- 1 *The chart should not be allowed to become static but should be up-dated frequently to meet changes in job responsibilities and in techniques in the whole field of the distributive trades.*
- 2 *The grid gives a practical, job oriented content for the training of managers in a company, an essential basis for any training programme. But as the grid itself shows, the manager should be constantly exposed to new thoughts and exchanges of experience. 'Rounding' of all managers is essential and adequate use must be made of the category B training topics. This is particularly true of top management levels, though the need is not exclusive to this grade.*

control chart

example 1—Small wholesale textile company employing 100 persons

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
TASKS	MANAGING DIRECTOR	GENERAL MANAGER	BRANCH MANAGER	TRAINING REQUIREMENTS A	TRAINING REQUIREMENTS B
Storage and distribution Decide policy on storage and distribution	*			{ Storage methods and practices; warehouse administration	Local, national communications planning
Plan warehouse and stockroom layout and routines	*			{ Stock control; work study; materials handling	Operations research
Operate routines		■	▲	{ Storage methods and practices; warehouse administration	Local, national communications planning
Control stock		*	■ ▲	Stock control	
Stocktake			■ ▲		
Control transport use and costs		* ■		{ Work study Transport economics Transport accounting	
		* ■	▲		
Allocate transport costs	*			{ Transport accounting Transport economics	
Plan and operate dispatch procedures		* ■	▲	Materials handling	
Maintain assets		* ■	▲		
Customers Plan and operate customer surveys customer services	* ■	■	▲	{ Market research; customer relations services	Public relations, human relations, consumer psychology, consumer education
Establish and implement customer complaint services	*	■	▲	{ Communications: spoken and written	
Build and maintain goodwill	*	■	▲		
Establish public image	*	■	▲		
Establish and implement public relations service	*				

Code Task performed at highest level *

Task performed at middle level ■

Task performed at routine level ▲

control chart

example 2—Multiple retail company

Column 1	Column 2	Column 3	Column 4	Column 5 TRAINING REQUIREMENTS A	Column 6 TRAINING REQUIREMENTS B
TASKS	MANAGING DIRECTOR	GENERAL MANAGER	BRANCH MANAGER		
Buying					
Study market trends	*	■		Statistical analysis	Statistics and economics
Plan policy on: range	*	■		Stock/range planning	Statistics and economics
quality	*	■		As for range planning	
pricing	*	■		Financial control; budgeting	
Forecast requirements		*	▲	Sales forecasting; company stock holding regulations	
Plan: stock assortment sales targets stock targets		*		As for range planning; stock management techniques	
Choose merchandise		*	▲	Merchandise assessment; company ordering procedures; commodity knowledge	
Negotiate with suppliers		*		Credit negotiation; administration of buying	
Control: quality quantity		*	▲	Quality control	
Undertake comparison shopping		*			
Liaise with manufacturers		*	▲	Administration of buying; company stock holding regulations	

Code Task performed at highest level *

Task performed at middle level ■

Appraisal of managerial performance

Purpose and design of appraisal schemes

The object of management appraisal schemes is to review individual performance so that training needs may be identified and the manager helped to do his work more effectively. Managers who are regarded as highly efficient should be included in these reviews as sometimes areas of weakness which had hitherto been obscured by an overall appearance of proficiency are disclosed by the appraisal process. Managers who are really as good as they seem may gain increased morale and satisfaction from formal confirmation of their efficiency.

By regular appraisals it is often possible to spot promotable men early enough in their careers to direct their training and experience so that they become ready for higher responsibilities sooner than if their potential had been left to emerge unaided.

Appraisal schemes vary widely in design and administration, ranging from elaborate schemes requiring specialists to run them and the use of complex forms and statistical methods of evaluation, to the informal undocumented 'I'm in touch with my managers' approach. There is no ready made textbook formula which a company contemplating the introduction of systematic management appraisal may select and use. To gain acceptance and be of maximum use, appraisal schemes must be devised to meet the needs and resources of individual companies.

Whatever method of appraisal is chosen, certain principles underlie them all. The most important is the acceptance by senior managers of a full share of responsibility for the development of their subordinate managers. The scheme will depend on their readiness to undertake the appraisal of managers, at the times and by the methods agreed, and to discuss the results frankly and constructively with the individuals concerned.

One of the difficulties of establishing a true developmental climate in a company is to persuade successive levels of management, whose immediate concern is to ensure technical efficiency and correct procedures in the job on hand, to spend more time on the longer term aspects of developing men by coaching and counselling them.

Implementation of appraisal schemes

Well within the scope of the majority of companies in distribution is

a scheme of management appraisal based on comparison of the results obtained by managers over an agreed period, with pre-determined targets or objectives arrived at in discussion, and agreed with the managers concerned.

Management job descriptions list the duties, operational tasks and relationships associated with each management position in the shop. Precise targets can be established for all the critical elements in a job description; figures of sales and profit to be attained over a given period can be estimated and agreed with the manager concerned; relationships can be closely defined in terms of accountability, and it is possible to indicate the kind and extent of co-operation with other departments necessary to ensure effective performance. Methods can be specified and special difficulties noted, together with suggested ways of overcoming them.

Experience shows that appraisal based on the results achieved gains greater acceptance and produces better results if targets are fully discussed and agreed with the manager, who must feel that the goals are reasonable and attainable. Some companies invite managers to set their own targets, for example on sales to be achieved, and whenever possible accept their figures. It is understood that all targets and objectives represent the contribution expected from individual managers to the company's overall budget.

When agreed, targets can be written on a simple form: an example is given on page 27. In this example the targets specified are some of those relating to the task of the branch manager whose job description is shown in Appendix 2.

The overall purpose, main objectives and delegated responsibilities in management job descriptions normally vary only during periods of reorganisation, or on the appointment of a new manager whose ability or experience may require some modification of the original responsibilities allocated to the job. When this happens the job description is, of course, altered.

Targets, however, will change frequently, according to the agreed period of time during which they are to be met. Some companies set targets which can be completed in two or three months. At the end of the agreed period targets and results are reviewed and discussed with the manager; the difficulties which were encountered, and the methods used in overcoming them, are carefully examined. This discussion becomes a thorough and objective survey, in

concrete terms, of the work done by the manager during the period and his progress in meeting or bettering the targets. It should be held in constructive and helpful terms; the manager being appraised must know that he has a full opportunity of stating his case, of offering suggestions which, in his view, might lead to improvements. This conversation leads to the question:

What does the manager need:

To help him to improve his job performance?

To help him to extend his knowledge and understanding?

The process emphasises again the need for a close training relationship to be established and sustained between a senior manager and his subordinate managers. This relationship is a continuous one and begins with the setting of targets or objectives in discussion with the manager who is required to achieve them, continues unbroken through the period of management and culminates in the appraisal discussion of achievements and difficulties.

The main characteristics of results oriented appraisal systems are:

- 1 Joint agreement is reached between the senior and the subordinate managers on critical aspects or main objectives of the job, methods of achieving results, and short term targets under the main headings
- 2 Attention is focused on results achieved rather than on personal characteristics
- 3 Emphasis is placed on the need for counselling, coaching and a helpful working relationship.

Difficulties and advantages

Some difficulties can arise from the mechanistic nature of appraisals based wholly on job performance. Experience shows that such difficulties are most noticeable in companies whose senior managers have not been convinced of the need for systematic management appraisal, or are not aware of the importance attached to it by the company's top management.

The main difficulties are:

- 1 Senior managers are sometimes unwilling to coach and counsel their managers and tend to put this off until after problems have developed. (This difficulty is not confined to any one system of appraisal.)
- 2 This tendency is strengthened in the case of results-based systems, on the grounds that the figures achieved are sufficient guidance to managers as to their progress

3 It is important to interpret figures with some care. For example, under the section 'staff management' the target figure for rate of staff loss might be 'Not to exceed 40 per cent per annum' and the actual rate of leaving might be only 10 or 15 per cent. It would be necessary to see whether this low rate indicated high branch morale and a hard working team, loyal and satisfied in their jobs—which would be signs of good management; or a group of workers content with an easy job under a manager who was easily satisfied or who turned a blind eye—which would indicate a need for training in some of the aspects of staff management

4 The application of short term targets requires some control over the methods used in meeting them. This control will stem from the relationship with the senior manager and his involvement with the development of his managers.

Research among companies using results-oriented appraisal systems of the sort outlined here has produced a good deal of consistent evidence, the main points being:

Performance improves most when specific goals are established. Participation by the employee in the goal-setting procedure helps to produce favourable results. Defensiveness resulting from critical appraisal produces inferior results.

Praise has little effect one way or the other.

Coaching should be a day to day, not a once-yearly, activity.

Interviews designed primarily to improve a manager's performance should not also be used to decide promotion or salary change.

Example of target setting—Branch manager (*Period March–September*)

This is an example of trading and management targets set for a six-months' period for a self-service branch of a food retailing multiple company. The branch has 1,500 square feet of selling space; has no credit or delivery services, and no licence. Sales have been slow at an average £1,200 per week; staff turnover has been running at a high rate, and stock losses have been unsatisfactory; staff productivity has been low. The

targets set are reasonable for the circumstances and the manager's results will be reviewed after six months to see how he has progressed towards the targets. These have been agreed with the manager after full discussion with him. NOTE: Targets set for all a company's branches, as indicated here, together equal the budgeted growth of the company over the agreed period. The system is applicable in companies of any size.

TASKS	TARGETS	METHODS AND PROCEDURES	SPECIAL DIFFICULTIES
Sales	£1,500 per week	Good presentation; filled shelves; local promotions. Watch on competitors' prices and promotions. Regular staff training, especially at checkout	
Net profit at branch level	5% of sales	Correct pricing (company policy). Merchandise checked for quality and number on arrival. Stock rotated to avoid overstocking and out of stock. Display to emphasise high profit lines, eg toiletries. Staff to be trained in security, eg notice suspicious customer behaviour. Watch delivery personnel while on premises. Security of premises. Discipline regarding staff purchases	Stock mix related to locality may have high proportion of low profit items
Personnel management Training and administration	Staff administration – as laid down in managers guide, or company regulations 1 Recruitment 2 Training 3 Sick pay 4 Holidays 5 Pay increases 6 Termination 7 Rate of staff turn should not exceed 40 per cent per annum 8 Staff costs should not exceed 6.5 per cent of sales, including costs of SET, social security and manager's salary 9 Sales per labour hour £5 0s 0d per week 10 Costs per labour hour 6s 5d per week 11 Sales per employee £166 0s 0d per week	Recruitment Job description, application form, planned interview, references Training Induction of newcomers. Train senior staff in job-instruction, all staff on customer relations. Weekly half-hour for specific teaching by manager; discussion and demonstration whenever possible as part of continuous educational relationship Items 3, 4, 5, 6 as required by company regulations, Contracts Act or Trade Joint Agreement. Prompt notification to HO	Difficult labour market

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Example of target setting (continued)

TASKS	TARGETS	METHODS AND PROCEDURES	SPECIAL DIFFICULTIES
Personnel management (continued)		Staff turn Reduce by careful selection, and job training to create interest Items 8, 9, 10, 11 All related to the way staff do their work. Aim at paying higher wages to fewer, better workers, by better selection and training. Work out economic balance between full time and part time workers, male and female workers, junior and senior workers	How to calculate Availability of right sort of staff
Administration	Weekly wages returns to HO to be in by Tuesday am Cash banking daily Returns of sales to accounts department daily Weekly order to central warehouse 48 hours before delivery required at branch Order through HO to suppliers by dates indicated	Establish work priorities with area manager; organise work load and instruct staff. Time to be reserved daily for required administration. Thorough knowledge of company regulations, requirements and systems. Maintain simple filing system for company instructions, price changes, promotions, etc. Instruct assistant manager or senior assistant how to proceed in your absence See also personnel administration	Availability of banking facilities Shortage of time and space for clerical work

NOTES: In this example, Contract Act requirements are met by a central personnel department. Weekly wage indents, absence notifications etc are required at HO by Tuesday mornings. Managers are instructed in all the simple calculations indicated above to help them systematically to measure, and improve, individual staff productivity and so control their wage costs, which affect their branch net profit more than any other operating cost

NOTE: In the real situation, the actual procedures laid down are listed in more detail

Assessing present and future management needs

This involves answering two questions from information contained in existing administration. Even in small companies this is a worthwhile exercise, requiring little time to complete; in larger companies, it forms part of the basic planning of the company's resources.

What have we got ?

Using the personal records of existing managers, including the notes made about their job performance, information can be extracted and the results summarised for convenience in the form of a simple availability chart as in the example overleaf.

Details of present post, age, retirement date, qualifications and experience will be in the personal records and the effectiveness of the manager and his promotability will be revealed by the appraisal system.

If deficiencies in certain aspects of job effectiveness are revealed can these be made good by training, coaching, varying experience, temporarily working under a more experienced manager, etc ?

If a manager is regarded as promotable, what future training will he need ? When would he be able to take over a new post ? Which new post ?

What shall we want ?

All foreseeable vacancies can be noted under the years in which it is expected they will occur and, using the chart of existing managers, names of probable successors may be entered alongside the anticipated vacancy, so that the developmental training of the successor may be designed to have him ready to take over the vacancy when it occurs.

In considering vacancies arising in the near future, account should be taken of immediate expansion plans, retirements and other separations pending, the duties and responsibilities of the posts and the experience and qualifications required to fill them. These details will be available from personal records and the job descriptions and specifications.

In considering longer term requirements account should also be taken of possible organisational changes.

Availability chart of existing managers

Name	Normal retirement date	Job effectiveness	Promotable	Probable post	When ready
Smith	1971	Adequate until retirement	—	—	—
Amos (department manager)	(2003)	Excellent	Yes	Store manager	1970 (summer)
Brown	1970	Adequate until retirement	—	—	—
White	1971	Less than adequate	No	—	—
Black (assistant manager)	(1990)	More than adequate	Yes	Store manager	1969 (April)

succession plan

Job	1969 Present manager	1970	1971	1972
Store X Manager	Smith	Smith	Smith retires Polson (trainee)	Polson
Store Z Department manager	Amos (promotable)			
Store Y Manager	Brown	Brown retires Amos (summer)	Amos	Amos
Store Z Manager	White (to be assistant manager Store X)	Black (April)	Black	Black
Store X Assistant manager	Black			

Specific training to be planned

Black — 3 months

Amos — 15 months

Polson — 6 months

The planned interview

When recruiting from outside the selection interview has three basic aims, and should be planned to achieve these aims as far as possible. The aims are:

- 1 To determine whether the applicant could effectively carry out the prescribed tasks.
- 2 To ensure that the applicant fully understands the nature of the work, its conditions and the circumstances in which it is carried out, to help him to make a sensible decision should the post be offered to him. At management level, the recruitment interview should help an applicant to gain some insight into the company's policies, makeup and main objectives. He should also understand clearly any possible later circumstances which might arise from the job, such as moving to other districts. Selection is a two-way process and both parties need as much information as possible.
- 3 To enable the interviewer to discern something of the applicant's disposition, motivation, abilities and aspirations so that he may judge as accurately as possible whether the job, the people with whom he will be working, the future prospects and other factors will suit the applicant and enable him to find job satisfaction and do well in the company.

Seeking information:

How may the interviewer achieve the aims?

The first aim:

'Could he do the job?'

Achieved by study of the work history, school or college record, training, etc shown on the application form, and by question and answer. Age; previous salary; how many jobs, and reasons for leaving them, are some important points to be explored.

Giving information

The second aim:

'Does he fully understand the nature of the job?'

The applicant should be given information about the conditions of service, duties, prospects, the company's objectives, outline management structure, brief description of salary review or management appraisal systems, etc.

So far the interview has been a systematic exchange of information during which each is consciously forming an impression of the other. These impressions are necessarily subjective, human and unreliable, and if they are agreeable (and this may be the case for

reasons entirely irrelevant to the filling of the vacancy), either or both parties to the interview may succumb to 'interview euphoria'. This is a generalised feeling of goodwill in which objective criteria may be lost sight of, and the job offered or accepted for unspecified reasons unconnected with its suitability or otherwise to the applicant. An interviewer is particularly liable to this if the work history of the applicant is favourable.

It is therefore very necessary to spend some further time on the selection interview.

The third aim:

'Will the job really suit him?'

'What sort of person is he?'

These questions are about 'job satisfaction'. Research shows that most people look to their work to provide them with interests and fulfilments which are more important to them than the amount of money they can earn in it (providing this is enough to sustain their standards of security and comfort).

This part of the selection process seeks to discover what the applicant particularly needs from his work. Does he seek security? Power? Companionship? Status? Challenge? Does the job provide what he needs?

If he is one of those whose chief interest is in the amount he can earn, will the job, or the company, be able to meet his ambitions in this respect?

Using the conversational method

One method is simply that of relaxed conversation, during which the applicant is encouraged to talk freely about himself, and the interviewer listens with careful attention and the occasional comment to keep the conversation going.

The skill lies in the listening. Once the fact-finding part of the selection interview is over the experienced interviewer does very little talking. By listening, he learns a great deal about the applicant and relates it to his knowledge of the job, and the company and the people who will be involved.

Careful induction of the newcomer

Induction occurs when the newcomer starts work, and may not be recognised as part of the selection process. But poor induction is often the reason why an apparently promising appointment comes to a premature end, or does not develop as hoped.

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Careful induction of the newcomer

Induction occurs when the newcomer starts work, and may not be recognised as part of the selection process. But poor induction is often the reason why an apparently promising appointment comes to a premature end, or does not develop as hoped.

The resulting resignation or dismissal increases the rate of staff turn, which is one of the measures by which the success or otherwise of selection methods are judged.

Conclusion

Many of the points touched upon in this discussion of management training and development are summarised in the concluding lines of a report published by the Acton Society Trust on their Survey of Management Training in 1962. They say:

‘As in so many other facets of management, the main conclusion to be drawn from these enquiries is that most companies can learn much from the practices of the best; and the main need is not to solve outstanding problems by discovery of new techniques but to persuade more companies that the problems exist and that solutions are already in use.

It is impossible, of course, to guarantee the success of any single (training) policy, because of wide variations in circumstances between industries and between companies within one industry. In general, however, a policy may be judged according to:

whether it enables the company to attract and retain able people by holding out prospects of ‘getting on’ and by making sure they are not overlooked;

whether senior managers rate the problem of succession highly among their responsibilities;

how easy it is to fill vacancies, even the unexpected ones, with well qualified employees.

To achieve this a company needs to:

realise and accept the importance of early selection and training, arrange for more organised talent spotting;

pay more attention to inequality of opportunity, wherever it exists, recognise the problems of introducing and training graduates and note the lessons of other companies’ experience;

understand and try to lessen the frustrations often felt by ambitious young men;

give each individual varied experience and intellectual stimulus as part of his training.

(Training) Policies must obviously consist of two parts—forecasting the future supply of and demand for potential managers, and selecting and training promising candidates. A successful policy is based on four essential ingredients:

Good raw material, the result of a high standard of recruitment and selection.

An adequate incentive to potential managers, given not merely by making salaries and conditions competitive but by creating an atmosphere helpful to initiative and nourishing a belief that merit is both noticed and rewarded.

A stimulus to self-development and provision of opportunities for it.

A sustained interest by senior managers which will help to convince officers at all levels that the development of good subordinates is one of the criteria by which they will be judged.’

Design and administration of training schemes

Training methods

Knowing the tasks at various levels of management and the training requirement necessary to carry them out satisfactorily it is then necessary to devise suitable training schemes.

When considering existing staff there are a number of training activities which can be organised within the company sometimes with the help of local colleges and visiting lecturers, or by the training office either alone or with the help of other senior executives.

In-company training

In-company management training is given either on the job itself, or off the job.

On-job

Direct instruction in technique and procedures of the job, by head of department.

Off-job

Coaching or re-instruction on weak points.

Discussions or demonstrations on specific aspects of the job:

Job rotation

Special projects

Deputy or acting managership

Short 'up-dating' courses

Short appreciation courses in new methods, or special management techniques in distribution

Direct instruction in techniques and procedures of next senior job

Seminars and discussions on areas of knowledge relevant to the position held: eg elementary economics, budgeting management, aspects of employment, etc.

External training

Training organised within the company may be augmented from external sources. These include attendance at management courses and conferences offered by management colleges, professional organisations concerned with management, technical colleges and other educational institutions, trade associations and chambers of commerce.

These courses fall broadly into three main groups:

General introductory courses

Management development courses

Courses on specialist subjects

External training may also include visits to suppliers' works and to other companies operating in the same area.

There is great value in the use of external management courses, of which a considerable variety exists. Although there are not yet as many geared specifically to distribution as the situation warrants, the supply will increase as management training in the distributive trades becomes more widespread.

The importance of external contacts and of exchange of experience, especially for senior managers, would be difficult to over-emphasise. In-company training itself is stimulated and broadened by 'competition' from the professionals, and by the experience and views of managers who have attended well chosen outside courses.

Management trainee programmes

A slightly different approach may be necessary in the case of specially recruited management trainees and promotable young people from within the company.

Individual programmes may have to be devised which include private study, on-job learning under supervision, planned management experience, and counselling by established managers.

Initial training within the company

Giving a general understanding of the policies, organisation, and procedures of the company, and of the functions and inter-relationships of its various parts.

Helping the trainee to 'get the feel of' the social climate of the company and to meet some key personalities.

Providing opportunities to gain acceptance from some superiors and from future colleagues and subordinates (an example of an internal training programme for a management trainee is given in Appendix 3).

Educational development

Leave of absence for further studies

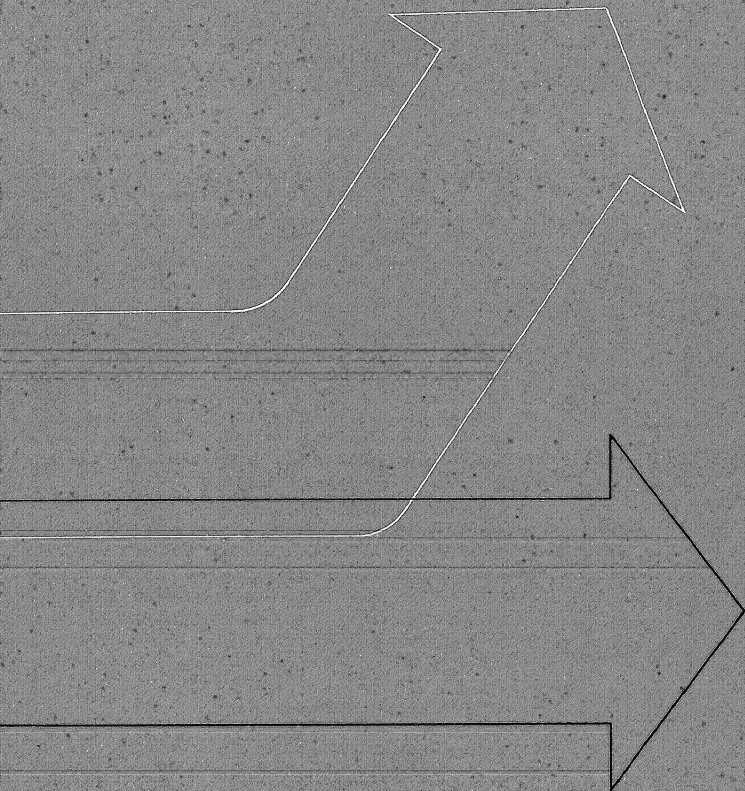
Professional society activities

Special management schools

Development reading

After-hours academic class work.

appendices



Appendix 1 The role of the company training officer

The role defined

The role of a company's training officer is very much the same whether he acts in distribution or in industry, and authorities generally agree on what he should do. The final (1965) report of the Industrial Training Council, and the report of the 1963 National Productivity Year conference on education and training define his job in identical terms. These are:

- 1 To advise management on the formulation of training policy at all levels, to interpret this policy to line management and to advise on its implementation.
- 2 To analyse the skills and knowledge required in jobs for which formal training is to be given.
- 3 To prepare training programmes.
- 4 To provide the full time or part time instructors necessary to carry out the programme and to arrange for their training in instructional methods and techniques.
- 5 To integrate a suitable further education programme with the training programme for each job and to arrange for its provision, either internally or externally.
- 6 To administer company training programmes and evaluate them at regular intervals.
- 7 To assist in the recruitment and selection of personnel to be trained for particular jobs, particularly if no qualified personnel officer is employed by the company.

What sort of man?

The Training Officer should:

- Be creative
- Be articulate
- Have a capacity for administration
- Be acceptable to management
- Be fully trained and experienced in teaching techniques
- Have an attitude to his work based on the view that planned training raises individual productivity at all levels and by so doing diminishes wage and salary costs and raises profitability
- Have a clear appreciation of the trading aims and policies of his company and the ability to understand the subjects of courses for which he is responsible.

If required to advise on recruitment and selection of personnel the training officer must have a good understanding of the techniques and processes of methodical personnel selection.

Conducting the role

In advising managements on the creation of training policy for 'all levels', the following training suggestions and reasons would be included:

Managers

The social 'skills' including selection and the teaching skills.

(Note: There is little correlation between having knowledge and being able to impart it. Teaching techniques have to be learnt by all of us);

Technical skills of store, depot or office management;
'Tool subjects' to help a manager carry out his management function of control more effectively, eg work study (introduction to);
'Background' subjects to help a manager see where his company or store fits in, eg elementary economics.

Management trainees

These need a planned syllabus, carried out faithfully by store or depot managers sold on the idea, and backed by a series of seminars on basic subjects at elementary level (£ s d of shopkeeping; merchandising and commodity knowledge; customer psychology, etc); much encouragement in undertaking trade courses; regular assessment and prompt promotion when deserved. Communications, teaching techniques, staff control.

Supervisors, department heads and craftsmen

Commodity training, teaching techniques if in charge of learners or juniors.

Office staff

New office skills for older clerks. Communications for the supervisors to help them explain to established staff the changes constantly taking place in office methods. Part time release for juniors, leading to Certificate in Office Studies, RSA examinations, etc.

Shop assistants and cashiers

Planned, regular, including on-the-job training to increase interest, competence, job satisfaction and earning rate.

Older

Retraining; finding the individual potential and giving it scope;

giving confidence.

School leavers

Cushioning the break from school to work. Setting standards.

Appendix 2 Examples of job descriptions

Example 1

Company Rightprice Ltd (multiple organisation)

Job Self service food store manager

Date issued 1 February, 1969

Issued by Area manager

Scope

To put into full and effective operation in his branch at all times the company's policies and procedures. To organise and direct the day to day operations of his branch within its budget targets, and to develop its full trading potential.

Duties

- 1 To develop maximum sales relative to the branch physical facilities.
- 2 To maintain a level of stock within the current budget.
- 3 To carry out company sales promotion policy and to initiate and execute local sales promotions in agreement with his area manager.
- 4 To count and record stock in the branch as may be required from time to time by the company for control and other purposes.
- 5 To protect and maintain the building, machinery, equipment, fixtures, fittings and vehicles of the branch and to report any action needed to maintain trade assets of the branch in good working order and in good state of repair.
- 6 To carry out company procedures as published from time to time for the safe custody of the cash, stock and other assets entrusted to his care.
- 7 To maintain the highest possible standards of housekeeping, with particular emphasis on hygiene and orderliness.
- 8 To prepare, maintain and submit such records and reports as may from time to time be required by the company.
- 9 To maintain an up to date copy of management guide and to carry out at all times procedures, regulations and instructions set out therein.
- 10 To establish and maintain adequate means of communication within the branch of the company's objectives, aims, endeavours, and decisions as they affect the branch personnel, by ensuring that the company's official publications are made available as intended

to branch personnel, and also by means of in-store meetings, discussions and informal training periods, particularly with younger members of the staff.

11 To keep his area manager aware, as far as possible, of local news and developments likely to affect the company's present or future interests.

12 To play an active part, so far as is feasible and consistent with his duties to the company, in the civic and cultural activities of the locality where his branch is sited, in order to further customer confidence and goodwill towards the company.

Scope of authority

Sales and stock

To order and maintain a stock of merchandise for resale in accordance with the company's stock assortment unless agreed otherwise with the merchandise manager or the area manager.

Credit

To adhere strictly to the company's policy for granting credit to its customers.

Expenses

To incur wage expenditure only to the limits authorised for his branch, and operating expenditure as laid down in management guide.

Personnel

Employees up to the rank of section head

Within the company's personnel policies and practices and in consultation with the area manager to engage, terminate and employ such assistants in his branch as will enable him to achieve the aims set out above. To provide constant supervision and training for his assistants in order to develop in them a satisfactory standard of work and to enable individual employees to develop and progress. To organise, direct and control the activities of the staff in the branch to ensure proper and efficient functioning of the branch in accordance with company policies and procedures.

Employees of the rank of section head

To engage, terminate and employ such personnel subject to the concurrence of the area manager.

Management trainees

To carry out as required from time to time schedules of training for

management trainees or others wholly or partly supernumerary to the branch establishment.

Relationships

Line

Responsible to the general manager, whose authority will be delegated to the area manager for the purposes of ensuring the efficient day to day running of the branch and the carrying out to the full all of the company's policies and practices.

Functional

Head office To co-operate to the full in carrying out company requirements on records, returns and requisitions.

Depots To co-operate at all times in helping the company's drivers unload vehicles. To help promote a smooth operation by punctual and correct ordering.

Example 2

Company Sellrite Stores Ltd

Job Department manager

Date issued 1 February, 1969

Issued by General manager

Scope

To be responsible for the smooth running of the department from both the merchandise and personnel angle. To be responsible for ensuring that customers receive the highest possible standard of service, and to ensure that their whole impression is that of pleasantness, cleanliness and efficiency.

Duties

- 1 To ensure that sales assistants carry out all the duties detailed in their job descriptions (copy attached). The best way to do this is by example.
- 2 To deploy staff so that there are, as nearly as possible, sufficient sales people on the sales floor at all times (viz meal times, holidays, sickness, etc).
- 3 To keep a staff attendance register and to distribute wages which are based upon the facts recorded in the staff attendance register.
- 4 To be responsible to the manager for the value of the stock held and to be responsible to the merchandisers for ensuring that the stock assortment is always complete. This will entail answering to

the manager for all queries concerning the paperwork for goods in sales, mark-downs, returns and shortage, and answering to the merchandisers for all queries concerning the physical control of stock—viz unit stock grids, merchandise range, mark-downs, checking the invoice against orders and returns.

5 To supervise the training of staff within the department.

6 To be responsible for staff discipline.

7 To be responsible for security and to be aware of company regulations concerning the apprehension of shoplifters.

8 To ensure that the department is always fully ticketed.

9 To ensure with the help of the display staff that internal display is always of a high standard.

10 To back up specific sale promotion by organising internal displays and descriptive tickets.

Scope of authority

Responsible to the general manager for standards of work, discipline and morale of sales assistants.

Relationships

Responsible to general manager.

Example 3

Company Jones and Brown Ltd

Job Sales assistant

Date issued 1 February, 1969

Issued by General manager

Scope

To sell merchandise in such a way that customers feel shopping in Jones and Brown has been a pleasurable experience and to behave consistently in a way which will build up the store's goodwill.

Duties

Selling To perfect techniques of selling so that customers buy what they need and not what the store wants to sell them.

Services To ensure that customers are aware of the services (eg approval, credit, returns, delivery) which the store offers, and of the specialist skills—such as decorating, cosmetics, corsetry advice—available from trained members of the staff.

Routines To acquire and apply a thorough knowledge of the store systems which govern:

Sales; cash, credit and COD

Returns; both cash and credits

Shopping cards

Approval and approval returns

Staff purchases

Cash drill on registers

The acceptance of cheques, foreign exchange etc

The delivery of customer purchases.

Cash To be responsible for totalling at the end of day all cash taken.

Stocks To ensure that the full stock assortment is always available and on show in the selling department, replenishing when necessary from the reserve stock areas.

Unit stock control To record the movement of merchandise by completing unit stock control records under the direction of the department manager.

Housekeeping To ensure that stock and fixturing is at all times clean and presentable.

Packing and wrapping To ensure that all purchases are wrapped quickly and competently with a minimum of expense.

Ticketing To advise sales manager of ticketing requirements and to ensure that all items of merchandise are clearly priced.

Display To maintain a consistently high standard of display within the department, with the help and advice of the display department.

Security To keep a constant check on merchandise in the department, especially high value goods, and to observe and report any suspicious behaviour by people in the store.

Telephones To be responsible for answering telephone enquiries in a pleasant and informative manner, taking whatever action is necessary.

Relationships Responsible to the department manager.

Appendix 3 Outline of a training programme for a store manager trainee (foodstuffs)

This programme is designed for 17/18 year old trainees with about two years' experience in the trade and probably with little formal or trade educational qualification. The programme will include in-store training by store managers and area managers as well as training by seminars at company training centres, colleges, etc.

In-store training

The time devoted to this will take into account the trainees' existing experience and the content will tend to emphasise the trading areas which are of special concern to the individual company. But it could follow this 4 × 6 months pattern:

Content	Approximate time devoted
Period 1	
Store—warehouse procedures	1 month
Stock control	
Shelf merchandising	2 months
In-store display	
Store housekeeping	2 months
Branch routines and returns	
Check-out control	1 month
Security	
Period 2	
Provisions and delicatessen section	1 month
Meat and poultry section	2 months
Greenfruit section	1 month
Non-food section	1 month
Wines and spirit section	1 month
Period 3	
General aspects of personnel	6 months
Staff control	
Staff utilisation	

Period 4

On floor junior management under two or more store managers	3 months
Trial store management under a store manager	3 months

Formal training and education

Practical training and background education will be given away from the store to supplement the on-floor training outlined previously.

Group seminars should be provided so that trainee managers can improve their performance by a free exchange of experience with their fellow trainees.

These seminars will include background topics but should also include practical sessions (eg bacon boning, etc) to refine, expand and measure the in-store training.

This training could be provided in a variety of ways internally in the company or externally in colleges or in a combination of the two.

Formal training content

The organisation of distribution

Types of retailer

Methods of retailing

Future retail trends

The company's history and objectives.

The emphasis will be on the part played by the trainee's own company in the retail scene and on the response of his own organisation to current circumstances and future trends.

The job of the store manager

His duties and functions

Basic management principles

Face to face supervision

His role in the total organisation

Company policy and the store manager.

The intention will be to show the trainee the broad canvass of his job and its importance in the total company operation.

Elementary economics

The £ s d of retailing

The need to make reasonable profits
The use of profit
Basic customer/retailer market relationships
Economic change and its effect on store operation
The importance of cash flow.

In an elementary but interesting and relevant way, the trainee/manager can be introduced to those economic conditions at work in the community at large and within his own store which affect the well-being of his company.

Studying the store area

Knowing his customers in their environment
Simple sales forecasting
Assessing customer needs
Pricing policies and his part in those policies
Relationships with his area supervisors.

To interest the trainee in his own area so that he may better serve his customers and obtain more sales and profit from his district. To show him the benefits of close collaboration with out-of-store management.

Making the best use of premises, fixtures and equipment

Control of store layout
Care of premises and equipment
Utilisation of store space
Store housekeeping and store standards.

Training the manager to care for and to use intensively the assets of his company. To maintain the store at company standards of appearance and hygiene, etc.

In-store merchandising and display

Shelf arrangement and display of merchandise
Special in-store displays
Use of window posters, display cards, etc.

To achieve and maintain company standards which are uniform in its stores.

Inventory management

Stock ratios
Ordering procedures
Storage
Stocktaking

Stock loss control

To show the manager how to keep his stock at the correct level, to keep it in good condition, to minimise leakage of all kinds and how to take stock accurately and quickly.

Store accountancy

Branch records and their use and importance
Control of cash, coupons, cheques, etc
Store budgeting.

As well as training the manager in normal store accountancy and in company house procedures, he should be trained to use store statistics as control instruments for the more effective operation of his store.

Store security

Premises, security checks and procedures
Control of staff customers and deliverers
Security problems outlined
Company security practices.

This is a most neglected area of training in many companies and should receive more attention. Too many managers learn from their own or close colleagues' own experience. The trainee must be trained to prevent as well as to cure security problems.

Personnel

Recruitment
Induction
Training
Allocation of duties
Effective communication
Staff welfare
Motivation and discipline.

The content and depth of study will be determined by the aspects of personnel work covered by the store manager. As the store size increases so does the need for improved ability in organising and communicating with his staff.

Store productivity

Performance yardsticks
Elementary work study techniques.

Sales promotion and development

Personal selling
Planning and conducting sales promotions

Building sales promotion calendars.

Throughout the emphasis will be on the manager's responsibility for aggressively promoting the sales of his store.

Specialists sections control

Butchery
Greenfruit
Wines/spirits
Provisions
Non-foods

The modern store manager will have to control specialists who will frequently know more of their individual department than he does. He must have sufficient training to control those experts in their own field.

Legal regulations

A knowledge of the law required by the manager of a food store
When and where to seek aid
How to deal with those legal situations within his responsibility.

Profit management

Control of expenses
Increasing total gross profit.

The profit aspect will have been a recurrent theme throughout the traineeship but at the end of his training there should be a gathering together and a re-emphasis on those points which are vital to the profitable operation of a store which are within the control of the store manager.

Appendix 4 Example of a 3½-day basic course for branch managers designed for in-company presentation

Basic management	Possible speakers
First day	
Morning	
Introduction	
The purpose and aims of management training	The managing director
Merchandising aims and objectives	The head of buying
Afternoon	
Branch organisation	
Organisation of the managers' work load	Personnel manager or general manager
A case study	
Second day	
Morning	
Report back on case study	
Group discussion	
Afternoon	
Legal aspects of shopkeeping	Company secretary
Discussion	
Third day	
Morning	
Principles of learning	An outside speaker, eg from a technical college
Training methods, with role playing	Personnel manager or training officer
Afternoon	
Interviewing with role playing	Personnel manager or training officer
Fourth day	
Morning	
The management function—training for what?	A director of the company
A summary of the course and feedback	